

DoITS Self-Service Help Portal

Guide

January, 2014

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Introduction

The purpose of this guide is to provide an overview of the Department of Information Technology Services (DoITS) improved customer service business process, resulting with improved communications, reporting and statistical analysis functionality via the Self-Service Help Portal.

Our enhanced Service Desk offerings encompass the introduction of a new web-based service management application that includes a Self-Service Portal. This streamlined functionality provides our customers with the appropriate tools required to initiate a service request or incident reporting, current ticket status, and integrated request handling historical data. This new feature set is available for customers through a web browser (Internet Explorer, Chrome, Firefox and Safari). Additionally, customers will have access to additional resources to include, knowledge base, and view and subscribe to Global Issue white papers.

Additionally, customers may reference our online training, hosted on our PeopleSoft User Productivity Kit (UPK) accessed via the following link: http://upk-prod01/IT_Training highlighting key features of the system.

Upon navigating to the portal address, the user is presented with the Portal Home Page.

Here the user is provided a variety of information and links.

Portal Self Service Launch Page

City of El Paso DoITS

Click to login

Home Public Documents

Quick Search Go

Thursday, January 23, 2014

Welcome

The mission of the Department of Information Technology Services (DoITS) is to provide innovative, managed technological solutions, and support services for all City departments, collectively transforming the service experience for our community.

DoITS is proud to provide vision, innovation, and phenomenal support services to our City leadership, internal client departments, and the community.

We strive to apply a compliment of effective business improvement and technology innovation to do our part, in support of the operational responsibilities and services of the City of El Paso. Our Project Management Office and Support Services Divisions are key contributors with delivering professional, resourceful service experiences for all that depend on us with delivering their technological needs.

We are proud to be a critical component of the City's overall operational and strategic objectives, and doing our part with enhancing our community.

Notifications

Maintenance

No records found

Other

No records found

Quick Links

[City of El Paso Website](#)

[Report an Outage or Issue](#)

[Browse Knowledge Articles](#)

[View Frequently Asked Questions](#)

Service Desk Hours

Monday - Friday **7am - 6:00pm**

Phone **915-541-4466**


1 Notifications

The **Notifications** area of the page provides information regarding scheduled IT **Maintenance** and **Other** notifications.

2 Quick Links

The **Quick Links** area provides links for common Help functions and the City website. Some of the options require user login and the user will be presented with a login box. (See 5 for login information).

3 Menu Bar

The **Menu Bar** provides a Home icon  which will return users' to the Home page. The Home Page will differ upon successful login.


The **Public Documents** is a collection of documents for a variety of topics

4 Search

The Search function provides for the search of open tickets and the knowledge articles.

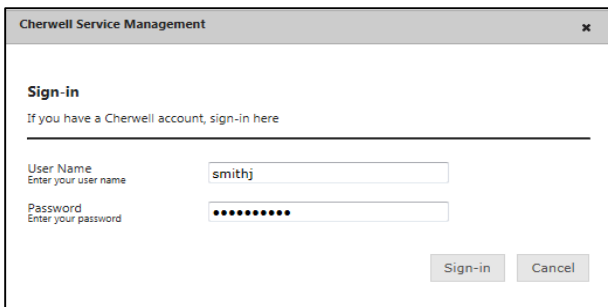
The user first captures the value to search in the data text box (where it says **Quick Search**) and then clicks on the 'Go' button. The user will be presented with a list results.

HINT. % sign can be used as a wildcard. Example: if users' type **app%**, the search will return all records that contained app, apply, application, applied etc.

The user may select to limit the search to specific object types such as Incidents only or Knowledge articles only. This filtering is done with the  drop down selection.

5 Login

The user will be prompted for the user name and password. The user network name and password are entered here, i.e. **smithj**.



The image shows a screenshot of a 'Sign-in' dialog box titled 'Cherwell Service Management'. The dialog box contains the following elements:

- Sign-in** header.
- Instruction: 'If you have a Cherwell account, sign-in here'.
- User Name** field: Labeled 'User Name' with the subtext 'Enter your user name'. The text 'smithj' is entered in the field.
- Password** field: Labeled 'Password' with the subtext 'Enter your password'. The field contains ten dots for masking.
- Sign-in** and **Cancel** buttons at the bottom right.

Portal Self Service

HOME

Upon login the user is presented with the Home Portal Page.

The screenshot shows the City of El Paso DoITS Portal Home page. The page features a header with the City of El Paso logo and a user profile for Patrick, Carolyn. Below the header is a navigation bar with links to Home, Service Catalog, Public Documents, and Charts and Items. The main content area is titled "Portal Home" and includes several sections: "Requests and Incidents" with links to Browse Service Catalog, Report an Outage or Incident, and View the Status of My Requests; "Top 5 Requests" with links to Password Reset, Phone Issue, Software Installation, Email Configuration, and PC Performance/Malware Issue; "Find Help" with links to Browse Knowledge Articles and View Frequently Asked Questions; "IT Notifications" with a table showing no records found; and a "Right Side Panel" with sections for My Items (Open Service Requests: 6, Open Incidents: 9), Status and Problems (Global Issues: 2, With a Workaround: 1, With No Workaround: 3), and Service Desk Hours (Monday - Friday: 7am - 6:00pm, Phone: 915-541-4466). Red arrows point to the Menu Toolbar, Requests & Incidents, Notifications, Find Help, and Right Side Panel.

Menu Toolbar

Requests & Incidents

Notifications

Find Help

Right Side Panel

IT Notifications	
Maintenance	Other
No records found	No records found

My Items	
Open Service Requests	6
Open Incidents	9

Status and Problems	
Global Issues	2
With a Workaround	1
With No Workaround	3

Service Desk Hours	
Monday - Friday	7am - 6:00pm
Phone	915-541-4466

Request and Incidents

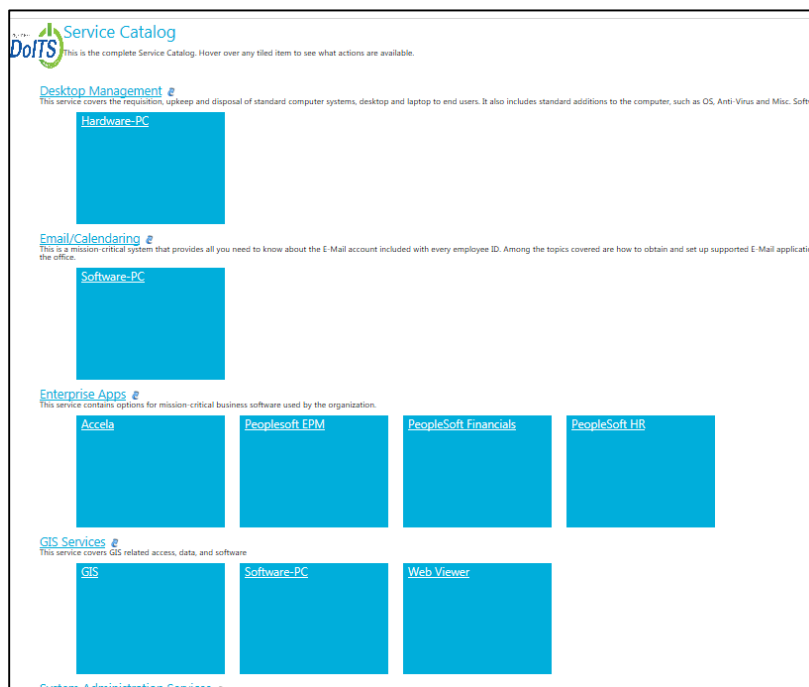
There are multiple methods to report an issue or to submit a Service Request.

1. From the **Requests and Incidents Section** or from the **Top Menu Bar** users' may select to view the **Service Catalog** for common service requests.
2. Use the [Report an Outage or Incident link](#) located in the **Requests and Incidents Section**.
3. Use one of the links in the **Top 5 Requests**. This area provides links for the most common request types.

Service Catalog

The Service Catalog may be accessed from the **Requests and Incidents Section** or from the **Top Menu Bar**.

The Service Catalog provides multiple Service Categories with common Request Types for each. Hover over any of the tiled Service Category items to see a list of available options. Some Service Categories are Desktop Management, Email/Calendaring, Enterprise Apps, Web Services and GIS Services.



Clicking on one of the options will navigate the user to a Service Request or Incident Report page.

Incident or Service Request page

The Incident or Service Request process is comprised of 3 steps to describe the Incident or Request, Provide Specifics or Urgency details, and Submit.

The Incident page or Service Request page may vary slightly based on the Incident or Request type. Specific detail fields may be available.

Detail information that should be provided may include:

- Computer name
- Application or Process name
- Number of users affected
- Frequency of the issue
- Error message
- How the application is accessed (VPN, City Network, Server01, etc.)
- Steps taken to produce the error,
- Module and/or screen where the error occurs
- Last time the application/process was utilized without error
- Other applications/processes being affected

The image displays two screenshots of the 'Incident 101305' form. The left screenshot shows Step 1: Describe Incident, where the user is prompted to describe the issue in detail. The text area contains the following information: 'Could you please restore files on X Drive for Jan. 10th. My compute name is PSTBND17. The network path is //ad.elpasotexas.gov/mypath and the files were located in folder MyDocs.' The right screenshot shows Step 2: Specifics, which includes fields for 'File(s)/Folders to be restored' (all PDF and docx files in the MyDocs folder), 'Full Server Path' (//ad.elpasotexas.gov/mypath/MyDocs), and 'Date Last Seen/ Accessed' (01/10/2014). A 'Technical Details' section below contains the text 'three PDF and 2 Word files in the myDocs folder'.

Step 3 includes a field to provide corrections or updates to Contact information. This information will be used to update System and Directory information for the employee when provided.

The image shows a screenshot of the 'Incident 106748' form, specifically Step 3: Summary and Submit. The form displays the contact information for 'Patrick, Carolyn' in the Department of Information Technology. A red rectangular box highlights a field labeled 'If this is not correct, or if you have alternate contact information, please comment:'. Below this is a 'Description' text area. At the bottom, there is an 'Urgency' section with two questions: 'Does this affect multiple users that you know of?' and 'Does this issue prevent you from doing your primary business function?'. Each question has radio buttons for 'Yes' and 'No'. A 'Submit' button is located at the bottom right of the form.

The Menu Bar provides options to Save, Abandon the request/incident, Field Value Lookup (as applicable), Attach a File, and navigate through records.



View Status

Users' may access information on your Open Items in multiple ways from the Home Page.

1. Single Click on [View the Status of My Requests](#) in the **Requests and Incidents** Sections.
2. Single Click on the [My Items](#) in the panel located on the right side of the page
3. Double Click on the Open Service Request count number under the [My Items](#) heading.
4. Double Click on the Open Service Request count number under the [My Items](#) heading.

Note: For options 3 and 4, users' must double-click on the number.

Other Features

[Knowledge Articles](#)


The [Browse Knowledge Articles](#) link displays Current Knowledge Articles. The [View Frequently Asked Questions](#) link displays frequently accessed Articles.

[Notifications](#)

As on the Portal login page, The **Notifications** area of the page provides information regarding scheduled IT **Maintenance** and **Other** notifications

[Status and Problems](#)

The [Status and Problems](#) section provides information on Global Issues. As with the [My Items](#) section, Global Issue Count Numbers may be double-clicked for specific lists.

In the list view for Status and Problems, the user can subscribe to a specific Problem by clicking Affects Me Too s in the selected Problem.